



Help Sheet 15: Assigning Consumers to a “WAITING” Status

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Assigning a Consumer to a Waiting Status

Summary

A "Waiting" status for a consumer occurs when the requested service is not being delivered due to the provider's lack of resources.

Consumers can be designated as waiting for any Care Enrollment, this designation can then be used to generate waiting lists.

Designating consumers to a "Waiting" status is a two part process.

Part 1 Enter all client intake information into the system, just like you would for any new consumer.

Part 2 Enroll consumer into a Care Program and assign a Care Enrollment Status of "Waiting".

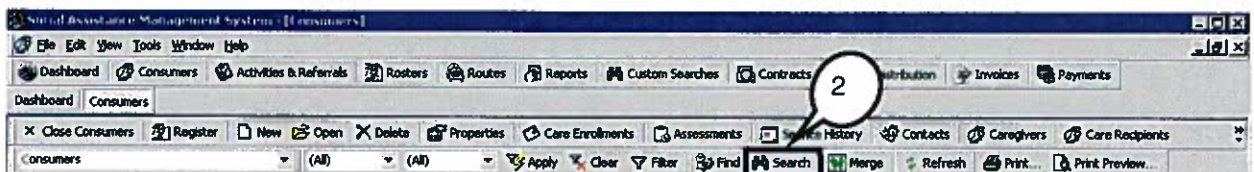
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Part One: Enter Client Intake Information

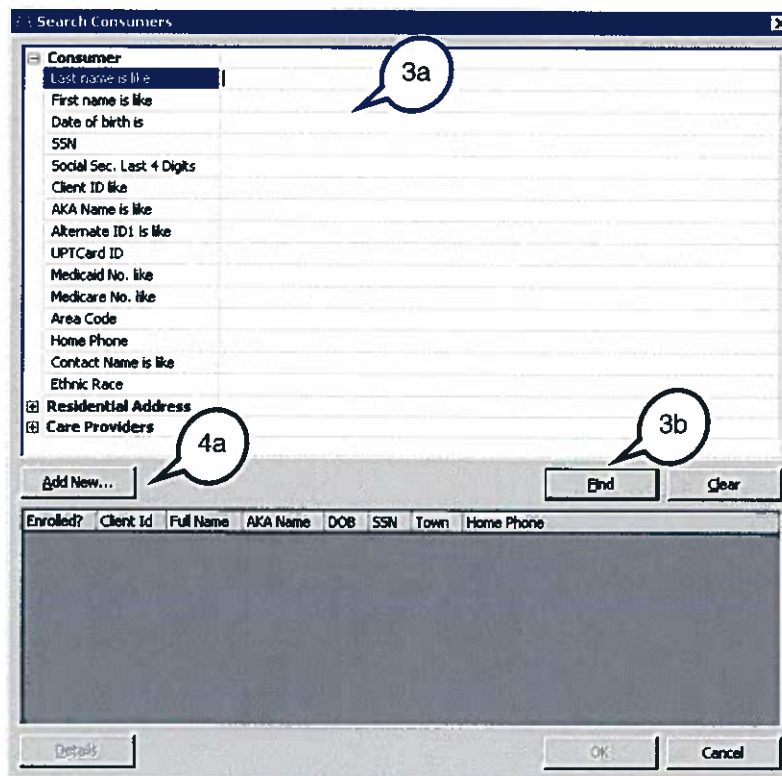
1. From the SAMS main menu, select the **Consumer** button.



2. From the Consumer menu area, select the **Search** button.



3. The Search Consumers window will appear. Use the search function to find out if the consumer is already in SAMS by (3a) entering appropriate search criteria, and then (3b) selecting the **Find** button.



4. If the consumer is not found, (4a) select **Add New ...** (consumer) button.

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4. Fill out the required (4b) Client Intake Information.

The screenshot shows a software interface with a sidebar on the left containing icons for Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, and Activities & Referrals. The main area is titled 'Untitled - Details' and has a 'Personal' tab selected. The 'Personal' tab contains a list of fields: First Name, MI, Last Name, Suffix, Maiden Name, AKA Name, Date Registered (04/16/2009), Consumer Details Last Reviewed (04/16/2009), Marital Status, Gender, Birth Date, SSN, Info Release Authorized (No), Default Agency (Los Angeles County AAA), Area Code, Home Phone, Residential Address, Mailing Address, NAPIS, Status, Insurance, Other, and Characteristics. A callout bubble labeled '4b' points to the 'Date Registered' field.

5. If the Consumer is found select that consumer then, select the **OK** button and move on to Part Two to do the Care Enrollment.

Part Two: Care Enrollment and Assigning "Waiting" Status

Once the consumer is created or found, enroll the consumer into a care program.

6. Select **Care Enrollments** from the Consumer Details sub-menu.

The screenshot shows the same software interface as before. The 'Personal' tab is still selected. A callout bubble labeled '6' points to the 'Care Enrollments (1)' option in the sidebar. The 'Care Enrollments (1)' option is highlighted, indicating it is the next step in the process.

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7. The Add Care Enrollment window will appear. Complete this as you would for any care enrollment (with the exception of the Status).

Please note that SAMS cannot attach a care enrollment for a period prior to the contract start date. Also the "Application Date", "Received Date", "Status Date" and "Start Date" have to be the same and must reflect the instance when the enrollment should have started for the consumer.

The screenshot shows the 'Add Care Enrollment' window with the following details:

Details:	
Level of Care	Federal Administration on Aging...
Service Program	Nutrition
Care Program Name	Nutrition
Application Date	04/15/2009
Received Date	04/15/2009
Termination Date	
Status	Active
Reason	
Status Date	04/15/2009
Start Date	04/15/2009
End Date	

Buttons: OK, Cancel, Add Next

Callout 7 points to the 'Received Date' field.

8. Select the **Status** field and then display the drop down menu.
9. Select **Waiting** for the status.

The screenshot shows the 'Add Care Enrollment' window with the following details:

Details:	
Level of Care	Federal Administration on Aging...
Service Program	Nutrition
Care Program Name	Nutrition
Application Date	04/15/2009
Received Date	04/15/2009
Termination Date	
Status	Active
Reason	Active Inactive Received Rejected Terminated Waiting
Status Date	
Start Date	
End Date	

Buttons: OK, Cancel, Add Next

Callout 8 points to the 'Status' field.

Callout 9 points to the 'Waiting' option in the status dropdown menu.

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This consumer is now waiting for a care enrollment into Nutrition. A report can be generated from the reports tab of all your consumers that are waiting for enrollment.